The CONSER Standard Record

CONSER
Cooperative Online Serials

Les Hawkins, CONSER Coordinator & Hien Nguyen, CONSER Specialist, Library of Congress

Introduction

CONSER has a new standard record
• focuses on meeting user needs
• facilitates record creation

Background

In Fall 2005, PCC and LC collaborated to establish a single standard record for serials using the access level record model for remote electronic resources piloted by Library of Congress.
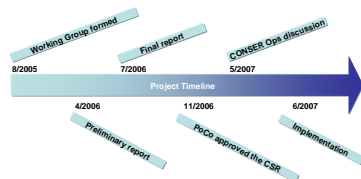
Regina Reynolds, Library of Congress, and Diane Boehr, National Library of Medicine, co-chaired the project.

FRBR user tasks to accommodate serials were identified.

The Access Level Record for Serials Working Group was formed to develop the data element set and cataloging guidelines.

Catalogers tested the element set and cataloging guidelines via pilot projects at 14 U.S. libraries. Reference, acquisitions, cataloging, and other staff reviewed the records. The Working Group adjusted the element set and cataloging guidelines based on feedback from pilots and others in the serials community.

In Fall 2006, the PCC Policy Committee endorsed the recommendations to implement a new cataloging standard record for serials.

Working Group formed 8/2005
Final report 7/2006
CONSER Ops discussion 5/2007
Project Timeline
Preliminary report 4/2006
PCC approved the CSR 11/2006
Implementation 6/2007

Project Goals

A single CONSER standard record that would apply to all formats, replace existing multiple record levels, and reduce serials cataloging and training costs.

A record created in a timely manner that consistently ensures identification and access to a serial.

| One standard record | Less costly |
| Focus on meeting user needs | Applicable to all formats |

The Process

Build the record based on user needs
    Evaluate core data set of elements using FRBR tasks:
        Find
        Identify
        Select
        Obtain
    Determine mandatory element set
    Develop cataloging guidelines

Test via pilot projects

    38 catalogers
    12 institutions
    327 records

    88 reviewers
    13 institutions
    reference, acquisitions, systems, etc.
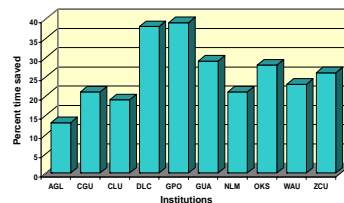   Majority of reviews were positive

Revise based on pilot results

Philosophy and Principles

Mandatory elements are listed on the Metadata Application Profile (MAP)
• Other elements may be added if required by the resource or institution
• Specialized resources may require specialized elements not in the MAP
• If using copy, retain all elements except those that are incorrect
• New records should be maintained according to the new standard

• CONSER standard record emphasizes catalogers informed judgment
• Follow the basic principles
• Do what makes the most sense

Results

CONSER standard records were projected to save 20-25% of the time needed to create current serial records, based on pilot results.

Percent time saved by institution: AGL, CGU, CLU, DLC, GPO, GUA, NLM, OKS, WAU, ZCU

Documentation

CONSER documentation includes:
    • General Principles
    • Metadata Application Profile
    • Decision-making Guidance
    • Record Examples
    • Rule Interpretations
Freely available to catalogers and trainers from the CONSER Web page: http://www.loc.gov/acq/conser/

CONSER Standard Record Basics

• Most elements are the same:

• All subjects, all headings, most titles, most links

• Uniform Titles are only required for non-analyzable serials with generic titles, monographic series, and when establishing headings for related work added entries. (All elements the cataloger uses to create "distinguishing" uniform titles are already in the bibliographic record.)

• Numbering is provided in unformatted 362 notes.

• Notes: DBO, title source, LIC (if needed) on all records

• Prefer links, display constants, etc. to notes

245	Record only title proper (subfields $a, $n, $p); data from subfield $b, $c recorded only in 246 or 7XX field
246	Use indicators 13 in all cases, except for: parallel title (11) or when a note is needed (1# $i ...: $a)
500	Give DBO/title source note in all cases, even if it duplicates information in 362 field
500	Give LIC note when different from DBO, even if it duplicates information in 362 field

• More elements are optional:
    006: all but 1st byte; 007: all but 1st 2 bytes
    008 22: except for microforms
    Some uniform titles
    Other title information (generally)
    245 parallel titles (retained in 246)
    Statement of responsibility
    Place of publication in limited cases
    Extent unless non-print
    Many notes, including 321, 550, 580,
    Added entries that duplicate links

• Any element essential for the description of a particular resource or to meet an institutional need may be added.

• One encoding level [blank]
    CONSER database subscribers e.g., PAMS, etc. were consulted and did not make any distinction between serial records with 4 and blank.

Implementation

Date: June 1, 2007
Will include a CONSER monitoring committee
Members will share local practices
Revisit periodically

A Work in Progress

LCRIs revised to support the standard
MARBI proposals to improve control of user display
Revise CONSER/SCCTP manuals

"The CONSER standard record is not intended to be any kind of end point on the cataloging continuum. However, it is a good start towards trying to come up with a more rational, systematic, and evidence-based record that meets user needs. Much work remains to be done to create the record of the future but we needed to start someplace." Regina Reynolds (LC)

Training

Stand alone SCCTP workshop available now!

Sign up for:
- June 22 workshop at LC (free – registration required – email hien@loc.gov)
-July and August Online classes with Amigos Learning Services http://www.amigos.org/learning/

Or contact Les Hawkins to sponsor or request a trainer/session (lhaw@loc.gov)

Acknowledgements

"Access level record for serials working group final report"

Regina Reynolds's PPT presentation on Access level record

Melissa Beck's CONSER standard record PPT

Further information available on CONSER Web page: http://www.loc.gov/acq/conser